



EFA Advanced Competence Framework

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Foreword

In an ever-challenging environment, fundraising plays an essential role in organisational success. As expectations on fundraisers continue to grow as a result, so too does the need for strong leadership skills – because today’s fundraisers must not only generate income, but influence strategy, build internal support, lead change, and demonstrate value across their organisations.

This makes it both an exciting and a challenging time to be a fundraiser, with demand for high-quality professional development growing rapidly. Fundraisers seek clear, credible pathways to progress their careers, strengthen leadership capability, and gain recognised qualifications that reflect modern fundraising practice. At the same time, there is increasing recognition among boards that where fundraising is supported as a leadership role, organisations are more resilient, sustainable, and better able to deliver on mission.

Courses and qualifications must therefore equip fundraisers to lead effectively, operate with confidence, and contribute meaningfully at a senior level. To support training providers in meeting this need, the Advanced Competence Framework provides a strong foundation for the design and delivery of fundraising leadership courses, aligned to the skills and proficiencies the profession needs now and for the future.

As a network of national fundraising organisations working together across Europe, EFA brings a uniquely informed perspective on the competencies required for success. EFA Certified courses reflect this collective insight and are recognised across Europe, offering tangible professional value. For fundraisers, certification represents not only personal achievement but a commitment to professional standards and ongoing development; for organisations, it offers confidence in the quality and relevance of the learning they provide.

By embracing this Framework, training providers can help build a stronger, more confident fundraising profession – equipped with the leadership skills required to thrive in an increasingly complex environment.



Eduard Marček
EFA Executive Director



Pia Tornikoski
Chair of EFA Certification Committee

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Introduction

At EFA, our mission is to strengthen and develop fundraising across Europe. Our certification scheme – the first European qualification framework for fundraising when launched in 2007 – is a core part of that mission. It enables fundraising associations to develop qualifications that share a common core syllabus and competencies, while reflecting their own cultural, economic and geographic contexts.

In 2018, EFA undertook a full review and revision of the framework – conducted by Professor Adrian Sargeant – to ensure it reflected the growing social impact of philanthropy, technological advances, new fundraising channels and trends, evolving regulation, and best practice. The bulk of this review constituted the EFA Standard Framework, but an Advanced Framework was also proposed, again authored by Professor Sargeant. This was adopted in the autumn of 2022 and officially launched in January 2023.

Although recently launched, the Advanced Framework was then reviewed in autumn 2023. Much of its content had originally been written around 2018, so was already five years old. During that period much had changed in fundraising, including increased awareness of equity and diversity (and power and privilege) in philanthropy and fundraising, developments in fundraising ethics, and the emergence of artificial intelligence.

This revision, led by Ian MacQuillin of international fundraising think tank Rogare, reflects those changes. The Framework has not only been updated with new competencies and content, but substantially restructured.

A central focus is fundraising leadership. The previous version used the terms ‘leader’ and ‘manager’ interchangeably. Yet while leadership and management are closely related and share some competencies, they are conceptually different and using the terms interchangeably can lead to confusion around who has what responsibilities.

Both involve working with others to achieve common goals, but leadership is an attribute or process that involves vision and the ability to motivate others to achieve that vision. Leaders are changemakers who make things happen. Management is the organisational function that facilitates and permits that change.

For the purposes of the Advanced Framework:

- **Fundraising management** enables a nonprofit organisation to achieve its fundraising goals effectively and efficiently through planning and organising. Management competencies include many of those set out in CF6.
- **Fundraising leadership** involves creating and improving the environment and context in which fundraising management can thrive. In addition to management competencies, leaders need deeper knowledge and skills in areas such as diversity issues, fundraiser wellbeing, building an organisational culture of philanthropy, new and emerging trends, and advanced fundraising ethics (reflected in the new CF7.2 section).

The Advanced Framework now uses 'leader' and 'manager' in line with these definitions. While not all fundraising managers are, or wish to be, fundraising leaders, all fundraising leaders should be competent fundraising managers. Furthermore, leadership is not defined by job title or seniority, but rather a set of competencies, appropriate knowledge, *and* a leadership mindset. Individuals at any level can be 'leaders' if they take ownership of projects and ideas, and make decisions related to them.

The Advanced Framework is intended to support existing fundraising leaders and managers, and to identify and develop the next generation – especially leaders – across all the European fundraising professions.

Specifically, its purpose is to equip fundraisers with the knowledge required to be leaders within fundraising organisations. It does not focus on teaching leadership behaviours or the application of that knowledge. This reflects the belief that leadership and management skills are far less effective without deep specialist professional knowledge.

This document is written in English. We recognise that the terms 'leader' and 'manager' may carry different meanings in other languages, and recommend that, when translating or discussing the framework, these terms are understood as defined in this document.

Finally, a note on diversity, equity, and inclusion (DEI). DEI is also known as EDI, JEDI (with the inclusion of Justice), and IDEA (with the inclusion of Access). For simplicity, the abbreviation DEI is used throughout the Framework to refer to all forms of DEI. For many competency sections, we have added required underpinning knowledge for DEI. We gratefully acknowledge Silvia Fontana, head of organisation, labour relations and HR at MSF Italy, for her insight in contributing to these additions.

Using the Advanced Framework

The Advanced Framework fundraising leadership competencies are organised in groups:

CF6: Strategic fundraising planning and control

CF7: Leading in a fundraising organisation

CF8: Fundraising and philanthropy in context, trends, and stakeholder engagement

Providers wishing to gain EFA accreditation for an Advanced Framework should demonstrate a minimum of 70 per cent coverage of the units in CF6, CF7 and CF8, which are outlined below. This leaves room for adapting the programmes to national needs and cultural aspects, although some modules do already point to the need for national considerations. This is the same requirement as for the EFA Standard Framework.

CFs 6-8 move progressively from management to leadership, with each unit setting out required competencies, supported by indicative underpinning knowledge to illustrate the expected depth and breadth of learning at Advanced level.

Providers preferring to deliver a more management-oriented qualification can weight their 70 per cent coverage towards CFs 6 and 7. Providers delivering a more leadership-oriented course can weight their content towards CFs 7 and 8. This may be particularly appealing for any providers already teaching some of the competencies contained in CF6 as part of their Standard Framework courses.

At what level should the Advanced Framework be taught?

The European Qualifications Framework (EQF) sets eight 'levels' for qualifications throughout Europe, describing the type of knowledge, skills and competence that should be taught at each level.

There is no straightforward answer as to which of these levels the Advanced Framework should be taught at. On the face of it, the most appropriate would seem to be level 5 (vocational/professional training/education or short-cycle higher education), and level 6 (bachelor's degree or equivalent). However, some organisations may wish to accredit a level 7 course (Master's degree) against it.

To maximise access and ensure as many future fundraising leaders are educated as possible, EFA allows member organisations to choose the EQF level at which they teach Advanced Framework accredited courses, with the options of levels 5, 6 or 7. However, we recommend that courses are taught at a minimum of level 6, particularly where the objective is to develop fundraising leaders rather than managers. When delivered at level 5, the Advanced Framework is more suited to manager development.

As general guidance, courses delivered at level 5 are more likely to focus on the fundraising leadership competencies in CF6 and CF7 of the Advanced Framework, while level 6 courses may focus more on CF7 and CF8. However, member organisations are free

to select content appropriate for their target audience and the level at which it will be taught.

Member organisations applying for accreditation must state at which level their course is taught, and provide evidence for how it meets this, particularly through learning outcomes. The accredited level will appear on the accreditation certificate, and as a condition of accreditation organisations must clearly state this level in all marketing materials for the relevant course or qualification.

For reference, the knowledge, skills and behaviours for levels 5, 6 and 7 are outlined in the supplementary document: *Developing learning outcomes: a practical guide aligned with the European Qualifications Framework (EQF)*.

Fundraising leadership competencies

This section sets out the fundraising leadership competencies for CF6, 7, and 8: what fundraising leaders must be able to do (requirements), and what they must know (underpinning knowledge).

CF6 Strategic fundraising planning and control

The CF6 cluster of competencies is about strategic fundraising planning, focusing on the whole organisation's fundraising activity and thus the aggregate strategy that will be adopted.

While fundraising leaders will need to attain these competencies, many sit squarely within the fundraising management function. Fundraising managers will be expected to develop objectives for the fundraising function as a whole that are consistent with organisational needs.

Managers and leaders must also be able to develop a fundraising strategy capable of achieving those objectives. In doing so, they demonstrate competence in designing, implementing and managing a portfolio of fundraising activities, as well as in developing the processes, procedures and metrics required for providing effective strategic control and appropriately stewarding organisational resources.

As such, the focus of activity in this cluster is largely the generic set of competences associated with strategy formulation, implementation and control, but also includes a separate set of competencies associated with management and strategic planning.

Fundraising leaders and managers must be aware of how DEI (diversity, equity and inclusion) considerations may impact the plans and strategies they develop. This includes recognising and mitigating any unintended consequences, such as the potential exclusion of particular demographic groups.

They must also understand the capabilities and limitations of artificial intelligence. Both – but especially fundraising leaders – must ensure appropriate and adequate human oversight of any use of AI in strategic fundraising, planning and control (see also AI ethics module in CF7.2).

CF6.1 Conducting a strategic fundraising audit

Requirement

Fundraising managers should be able to conduct a strategic fundraising audit. Such an audit may be the first component of a strategic fundraising plan, or a control mechanism for assessing the organisation's current strategy and fit with both the internal and external fundraising environment.

Fundraising leaders and managers should be able to critically evaluate the health of their current fundraising strategy and make informed recommendations for change if and when necessary.

Underpinning Knowledge

The role of audits: The purpose of a strategic fundraising audit, structure and content. Use of the audit mechanism as a strategic control.

External fundraising audit: PESTLE analysis, competitor analysis, collaborative analysis, market analysis/research, supporter/donor analysis.

Fundraising strategy audit: Methods of assessing the appropriateness and effectiveness of current objectives and the strategic approach. Portfolio management. Analytical tools, e.g. product/service lifecycle, nonprofit portfolio analyses, advantages/disadvantages of a range of portfolio models. Underlying assumptions.

Fundraising organisation audit: Methods of assessing the structural capability of the organisation and its suitability for implementing the strategy needed for the developing environment. Structural types and associated strengths/weaknesses.

Fundraising systems audit: Methods for assessing the quality of the organisation's systems for analysis, planning and control. Systems for payment processing, acknowledgement, stewardship, etc.

Fundraising productivity audit: Methods for evaluating fundraising cost-effectiveness. Performance of fundraising by expenditure level.

Fundraising functions audit: Methods for the strategic evaluation of each form of fundraising.

SWOT analysis: Strengths, weaknesses, opportunities and threats (SWOT) analysis, methods of prioritising factors, and interpretation of findings. Threat matrix.

Artificial intelligence: Available AI tools, both generic and those specific to fundraising. Capabilities and limitations of both. See CF7.2 for underpinning knowledge regarding AI ethics to be applied here, particularly: fair use of data, quality of data, encoded biases in data - meaning any kind of data, including text and images, not just statistics and information contained in a CRM system.

CF6.2 Strategic fundraising and planning

Requirement

Fundraising managers should be able to design, develop and implement a strategic fundraising plan for a focal organisation. They should be able to synthesise information from the audit to derive fundraising objectives consistent with both the needs of their organisation and the internal and external constraints of the environment. They should

also be able to derive strategies to meet those organisational objectives, including the derivation of an appropriate portfolio of fundraising activities. All recommendations should be informed by evidence and consistent with legal and ethical requirements.

Fundraising leaders should ensure fundraising strategies promote equal opportunities to make charitable donations among all types of potential donors. Fundraising managers should ensure that fundraising planning takes appropriate measures to provide opportunities for all types of potential donors to give.

Underpinning Knowledge

Planning: Benefits and drawbacks of planning, approaches to planning, alternatives to planning, incrementalism, fit of the planning process with the organisational environment. Planning as a process.

Fundraising objectives: Importance of SMART objectives, processes for objective setting, categories of fundraising objectives. Primary and secondary objectives. Relationship between fundraising objectives and organisational objectives and mission/vision. Nature of corporate objectives.

Fundraising strategy: Overall direction. Segmentation – a priori and post hoc approaches. Criteria for evaluating segment viability and attractiveness. Positioning: value proposition, sources of distinctiveness, product positioning matrix. Case for support: methods for derivation of case for support. Importance of securing institutional buy-in.

The fundraising mix: Methods for selecting appropriate fundraising activities, channels and products. Best practices in relation to each. Sector benchmarks for performance and associated timescales.

Developing a fundraising budget/plan: Methods of budget setting, categories of costs (fixed, variable, joint), behaviour of costs. Accounting for risk and uncertainty.

Scheduling: Use of Gantt charts or alternatives.

Monitoring/control: Control defined, control concepts, approaches to control, key fundraising controls, behavioural factors, contingencies, management reports.

Diversity, equity and inclusion (DEI): Definitions, basic introduction to DEI matters and how they relate to fundraising. Giving patterns among donors from diverse backgrounds. Potential biases in fundraising mix/communications that lead to over- or under-representation of certain demographics in the donor base. Ensuring inclusive communications. Potential biases in recording donors in the CRM system that lead to an incomplete picture of the donor base. Best practices, tools and guidance in DEI and how it can be applied to fundraising planning.

Artificial intelligence: See CF6.1.

CF6.3 Resource planning and control

Requirement

Fundraising managers should be able to secure, plan and control the resources necessary to achieve selected fundraising objectives. They should be able to effectively manage risk in the fundraising function, implementing and supervising a range of appropriate controls. In comparison to their more junior colleagues, more senior fundraisers should be able to secure a proportionally larger and more diverse set of resources to achieve a more comprehensive set of fundraising objectives. They should also be able to manage more significant risks across a range of fundraising functions, which means that they should be able to implement and supervise a more complex range of controls.

Underpinning Knowledge

Assessing fundraising performance: Return-on-investment (ROI) models, post-investment appraisals, actual performance versus objectives, lifetime value (LTV) models, range of metrics appropriate for each form of fundraising, importance of measuring drivers of longer-term value. Role of donor satisfaction and commitment.

Behaviour of fundraising costs: Definitions, differences between fundraising, programme, governance and administration costs (note: categories will vary by jurisdiction), average versus marginal costs, key drivers of fundraising costs, key fundraising ratios and how to calculate them. Weaknesses of such ratios. Principles of effective benchmarking and reporting. Sector benchmarking initiatives – Fundraising Effectiveness Project.

Securing Investment: ROI models, payback period, discounted cash flow, net present value, profitability index and rate of return. How to present a case for investment to a range of donors.

Risk management: Definitions, risk assessment, analysis and evaluation, risk control and treatment and risk communication.

Resource planning: Resource planning techniques, critical path analysis, and management reporting.

Management controls: Control defined, basic control concepts, responsibility accounting, approaches to control, controls, behavioural aspects of control, taking corrective action.

DEI: Same competencies as listed under CF6.2 are applicable.

Artificial intelligence: As CF6.1.

CF6.4 Managing capital campaigns, major donors or legacy programmes

Choose one of the three items: Capital campaigns, major donors or legacy programmes.

Requirement

Fundraising managers should be able to plan a capital campaign, major donor or legacy programmes, working with senior organisational and board leadership guidance (as appropriate for the jurisdiction).

They should also be capable of conducting or commissioning an assessment of readiness to test the viability of a campaign or programme. They should then be able to develop systems and procedures to support the campaign or programme and to track and evaluate its effectiveness.

Fundraising managers and leaders should ensure capital campaigns, major donor fundraising and legacy programmes are inclusive and do not unwittingly exclude potential donors through inherent bias in communications or in the database.

Underpinning Knowledge

Capital campaigns, major donor or legacy programmes: Definition of capital campaign, major donor or legacy programme. Campaign or programme types (comprehensive, traditional bricks and mortar, endowment, project-based, etc). Silent and public phases and activities associated with each.

Campaign feasibility: Constituency, market involvement, gift support history, prospect development plans, systems/record keeping, involvement of board, staff/volunteer capacity, potential for lead gifts.

Planning: Strategy, structure, systems, implementation, research, CAP (Capacity, Affinity, Philanthropy) donor evaluation, prospect evaluation programme. Volunteer engagement and management, volunteer and staff roles and responsibilities.

External counsel: Hiring process, management, accountability and feasibility study components.

Campaign processes: Banking, thanking/acknowledgement, criteria for award of naming or other recognition opportunities, processes for donor stewardship and development. Development of campaign policies, e.g. gift acceptance policies.

Organisational integration: Interdepartmental and programme collaboration, staff/volunteers, ongoing fundraising activities vs. campaign or programme duration.

DEI: Same competencies as listed under CF6.2 are applicable.

Artificial intelligence: As CF6.1.

CF7 Leading in a fundraising organisation

This cluster of units is concerned with the nature and scope of fundraising leadership. Fundraising leaders should be able to lead and manage both their own fundraising teams and the organisations they work for to release the full potential of fundraising.

This starts by selecting the right team members and creating a work environment in which staff will thrive and reach their full potential, while at the same time protecting them from any harm that might result from performing their roles. At all times fundraising leaders should be inclusive and promote a diverse workforce.

Fundraising leadership requires a high degree of ethical literacy, more so than just being acquainted with relevant codes and a superficial knowledge of ethical dilemmas and issues. This is because fundraising leaders will need to make decisions with the potential for both good and harmful outcomes to fundraising's two main stakeholders - beneficiaries and donors (see CF8.1 and CF8.3 on stakeholders).

Similarly, fundraising leaders must know when they need to innovate in fundraising in order to deliver the best outcomes for their stakeholders, and to do this they require an understanding of the innovation process.

As stated above, a key function of fundraising leadership is to build the fundraising capacity of the whole organisation. This requires sufficient understanding of how marketing is practised in other specialisms. In particular, fundraising leaders should understand how campaigning/advocacy and the marketing of service provision are typically undertaken, and how organisations manage and leverage their brands. Fundraising leaders should be able to speak the same language as colleagues in other functions, and to identify and exploit opportunities to work collaboratively for the benefit of the whole organisation.

Fundraising leaders should also be capable of critically evaluating an organisation's culture, identifying the key components for fundraising success. They should be familiar with how culture is developed and influenced, and (subject to senior management buy-in and agreement) be capable of leading the creation of a philanthropic culture that places philanthropy *and* fundraising at the organisation's heart, supports the fundraising strategy, enhances the quality of the supporter experience, fosters innovation in fundraising, and publicly advocates for and supports the fundraising profession.

CF7.1 Leading a fundraising team

Requirement

Having the knowledge, skills and behaviours to manage and lead in a variety of organisational settings is essential for an individual and their organisation to succeed. Fundraising leaders must understand how to train, lead and motivate their teams. They should be able to recruit, induct, develop, retain and empower/capacity-build fundraising talent, whether staff or volunteers. They should have a command of relevant theoretical

models, management and leadership styles, and approaches designed to promote respect for diversity. They should be able to generate mutual trust, respect and support from others. They should have critical thinking and problem-solving skills, which will also include an understanding of how to use and interpret research.

Underpinning Knowledge

Leadership: Definitions, attributes associated with leadership, approaches/aspects of/ to leadership, links between leader behaviour and employee attitudes and performance, relationship between subordinate maturity and leadership style, decision-making styles, evaluation of leadership styles, leadership models.

Staff recruitment: Identify competencies and key attributes required for a role. Identify and justify levels of experience (including voluntary) and education (formal and professional) required for a role. Identify and assess transferable skills. Write job descriptions and person specifications. Meet DEI requirements and obligations (see CF6.2). Set appropriate remuneration, transparency around remuneration, importance/role of remuneration. Screening and selection methods. Induction, training, and need for further development. Key legal and ethical considerations, equal opportunities, discrimination (see also CF6.2).

Motivation at work: Nature of motivation, the McClelland studies, Maslow's hierarchy of needs, Two Factor Theory, Expectancy Theory, Reinforcement Theory, Equity Theory.

Professional development: Identify gaps in staff knowledge/competencies, and provide appropriate professional development to meet them. Role of professional development in motivating staff and improving effectiveness.

DEI and staff wellbeing: Staff vulnerabilities, potential sources of harm to staff. Types of harassment and bullying, including coercive behaviour, physical abuse, excluding people from group activities, and others. Best practice in protecting staff, especially through a DEI lens (See CF6.2). Reasons for fundraising staff turnover. Potential psychological harm to fundraisers through doing their job (e.g. feeling responsible for the sustainability of the whole organisation; second-order trauma from encountering stories/images about the plight of beneficiaries). Inappropriate behaviour by donors: evidence for this, types of inappropriate behaviour, measures/policies to protect fundraisers from this.

Group dynamics: The nature of groups, types of teams, stages of team development, impact of team properties on performance, and team roles. Group decision making, groupthink, group decision-making techniques.

Conflict: Definition, sources of conflict, levels of conflict, strategies for its management (e.g. increasing constructive conflicts and reducing destructive conflicts), and styles of conflict management.

Performance appraisal: Reasons for appraising performance, methods of performance appraisal, sources of tension in feedback interviews, elements of a successful feedback interview, characteristics of an effective appraisal system.

Volunteer recruitment and motivation: Characteristics of volunteers, motives for involvement, barriers to involvement, sources of dissatisfaction, retention strategies. Characteristics of volunteers, volunteer/employee motivation, job descriptions, person specifications, screening, selection methods. Induction, training, and need for further development. Key legal and ethical considerations, equal opportunities, discrimination, and importance. Key reasons for volunteer/employee attrition and strategies for prevention.

Working with suppliers: Knowledge of contract law and fundraising regulation as it applies to working with suppliers. Write a brief setting out objectives, translating relevant learning from CF6. Set key performance indicators and key indicators of success; put in place ongoing monitoring and evaluation. Account management and oversight, ensuring appropriate training for supplier personnel, and monitoring standards. Appropriate methods of remuneration and payment, such as flat fee, cost-per-donor, and commission basis, in countries where this is permissible.

Research, critical thinking and problem solving: Understanding theory and evidence: what is theory?; what is evidence?; different types of evidence (e.g. statistical, lived experience). Different research methodologies and paradigms (e.g. positivism, critical realism, interpretivism, critical theory, etc.), their strengths and weaknesses, application and use in fundraising/philanthropy research. The difference between qualitative and quantitative research. Advantages/disadvantages of different types of research. Understanding and interpreting research – e.g. sample size, variables, testing, significance, etc. (some of this is covered in the CF5.3 on donor research in the Standard Framework; it may therefore be appropriate to provide a refresher for students who have already studied this). What is critical thinking? Analysing and evaluating arguments: identifying sound arguments; recognising biases and logical fallacies. Appropriate use of evidence and theory to resolve arguments. How to critique a research or conceptual paper, or report. Apply critical thinking to problem solving: generate solutions and evaluate alternatives. Ability to critically reflect on one's own positions and arguments. Apply critical thinking to ethical issues – see CF7.2.

CF7.2 Ethical and regulatory issues for fundraising leaders

Requirement

Professional ethics lie at the core of every profession's practice, including fundraising. While fundraising leaders and managers have to know *what* works in professional practice, they must also know whether they *ought* to do the things that work, and whether, even if they work, they might have unintended outcomes for certain stakeholders. Fundraising leaders need to be able to make ethical decisions in fundraising and to advise others on how to make ethical decisions. To do that, fundraising leaders need to be fully conversant with the ethics of professional fundraising to ensure that fundraisers and the organisations for which they work make the best decisions for all stakeholders.

Underpinning Knowledge

Fundraising regulation/self-regulation: Forms and models of regulation and self-regulation (e.g. statutory/state regulation, 'pure' self-regulation, co-regulation); strengths and weaknesses of each. Components of self-regulation: code of practice/standards, complaints procedure, standards monitoring, etc. Role and limitations of codes of practice, particularly vis-à-vis fundraising ethics (see below). Critical evaluation of all aspects/components of self-regulatory methods and appropriateness for the focal jurisdiction(s). Role of the fundraising profession in the design, implementation and development of appropriate regimes. Involvement of other organisations in the regulation of the focal jurisdiction, e.g. government, ratings agencies and 'watchdogs'.

Corporate responsibility: Like any organisation, the actions of nonprofits and their departments will have impacts and effects on society. Fundraising leaders will need to know what measures – if any – they may need to take to address them. Corporate responsibility: what is it, current trends, and how does this apply to nonprofits and fundraising? ESG (environmental, social and governance) goals and how they relate to fundraising. Impact reporting: what is it, how to report fundraising's corporate responsibility and ESG impact? What needs to be measured/assessed in fundraising impact reporting? What steps can be taken to address any potentially harmful impacts? How can these steps be factored into fundraising's operations without making fundraising less efficient and/or effective?

Fundraising ethics:

Ethics 101: What is ethics? What is it used for? Normative and applied ethics. Normative ethics – consequentialism, deontology and virtue ethics. What is an ethical dilemma? Ethics, objectivity and subjectivity (what is the role of personal opinion in making ethical decisions?). Relationship between codes of practice and ethics.

Ethical dilemmas in fundraising: Recap – what is an ethical dilemma? Stakeholders to ethical dilemmas in fundraising (see CF8.1). Common types of ethical dilemmas (and *why* they are ethical dilemmas) include: Gift acceptance/refusal ('tainted money'); pressure and undue pressure; guilt, and other emotional triggers. Ethics of using nudge and behavioural science methods in fundraising. Data protection ethics as it relates to fundraising (e.g. in terms of GDPR, when are consent and legitimate interest appropriate/inappropriate?). Introduction to the ethics involved in the use of text and images, framing and 'poverty porn'. Introduction to fundraiser remuneration (including commission-based pay). Grey areas in codes of practice; ethical issues not covered by codes of practice. Other ethical dilemmas/issues/challenges that are not described here.

Normative fundraising ethics: What is the key/core purpose of fundraising ethics; how does fundraising ethics contribute to/facilitate the role fundraising performs; what is the relation of money raised vis-à-vis fundraising ethics? Normative lenses of fundraising ethics – for example, Donorcentrism, Trustism, Rights-Balancing Fundraising Ethics, and others. [NB: we are not stipulating which types of normative lenses should be included, but recommending that normative lenses are included, and using these as examples. There are others you can use.] The role of organisational values in fundraising ethics.

Other community/beneficiary-oriented approaches to fundraising ethics (see CF8.1 and CF8.2), if appropriate.

Ethical decision-making: Different ethical decision-making frameworks and how they might be used. Consideration of decision-making frameworks designed for marketing and fundraising. Using normative lenses (see previous section) to resolve ethical dilemmas. Identify and balance duties to different stakeholders (who are fundraising's stakeholders? – see CF8.1).

Gift acceptance and refusal: What are the ethical grounds for refusing a donation: harm to charity; moral principle (conflict with cause, alignment with charity values, morally unacceptable source), or other? Gift acceptance/refusal policies and how to create, interpret and use them; role and limitations of policies. Role/relevance of personal morals/ethics in organisational decisions to accept/refuse donations. Ethics of refusing donations from sources that cause harm to society, e.g. climate emergency; what does the legislation and regulation in the focal country say about this matter? Ethics of returning donations; what are the issues involved; how does this differ from the ethics of refusing a donation?

Use of images and stories: What is framing? Positive and negative framing; loss and gain framing; evidence for and against in fundraising effectiveness. Ethical issues involved in framing: raising money versus impact on beneficiaries/service users (such as saviourism, loss of dignity, stereotyping, and others). Balancing these issues. Critically reflecting on how and why many charities are divided on this issue between fundraising and other departments; how can this division be resolved? Involving beneficiaries/service users in co-creating fundraising: evidence for and against; ethical issues. Co-production/co-creation theory and best practice.

Ethical implications of using AI in fundraising: Fundraising leaders need to ensure that: AI is being adopted to perform tasks it is suited to; the decision to adopt and implement AI is made with a full understanding of both its capabilities and ethical implications; and they are not adopting AI as a result of feeling pressure to adopt it before the organisation is ready. Once adopted, they have a responsibility to ensure their use receives adequate human oversight from fundraisers with relevant competencies. Ethical issues relating to the use of AI in fundraising fall into two main categories: 1) ethical implications of using AI, and 2) using AI to solve ethical dilemmas in fundraising.

Ethical implications of using AI in fundraising:

Data: Fair use of data, ownership of/intellectual property of data, quality of data, encoded biases in data - [Data refers to any kind of data, including text and images, not just statistics and information contained in a CRM system.]

Equity: Encoded biases in data; exclusion of demographic groups from giving; manipulation or misrepresentation of beneficiary groups; exclusion of service users and replacement by AI-generated images and stories.

Transparency and stakeholder expectations: Should the use of AI be disclosed to donors? Should donors have to consent to having their data processed by AI? What are the ethical

implications for all stakeholders; how are these balanced? Potential impact on giving/giving behaviour. Donor expectations about the use of AI in fundraising. Relationship to trust in fundraising. Beneficiary/service user expectations about the use of AI in telling their stories.

Accountability: Who is responsible/liable for errors resulting from the use of AI? Relationship to regulation and compliance with codes of practice. Relationship to trust in fundraising. Oversight mechanisms/safeguards for the use of AI in fundraising.

Second-order effects: Replacement of staff by AI; loss of professional/organisational knowledge if experienced staff are replaced by more junior staff. Pressure to adopt AI. Climate impacts of using AI.

Using AI to make ethical decisions: Asking/interrogating Large Language Modules (LLM) about fundraising ethics (what does AI know about fundraising ethics?); training/using LLMs to guide the decision-making processes (e.g. prompting questions at each stage of a gift acceptance/refusal policy); adapting codes of practice to incorporate issues related to AI-specific practice.

NB: CF8.3 includes further competencies for using AI to engage with stakeholders.

Fundraiser remuneration: Critical reflection on appropriate and inappropriate methods to pay/remunerate fundraisers. Critical reflection on the reasons why commission-based pay is generally prohibited and why, when and if it is appropriate. Should fundraisers receive bonuses? Other ethical dilemmas, e.g. gifts offered by donors.

Other related matters:

Upholding public trust and confidence: Definitions, distinction between the two terms, determinants of trust in the sector, determinants of trust in a nonprofit organisation, measures to build trust and confidence, importance of transparency/representing fundraising of the organisation to the wider public. Relationship between trust and giving and whether this is correlative or causal (i.e. do higher levels of trust result in increased giving, or does more giving lead to greater trust?).

Fundraising reporting: Definition. Importance of accountability and transparency. Adequately communicate the definitions of fundraising costs, fixed/variable costs, methods of cost allocation, definition handling and documentation of joint costs. Accounting and audit requirements appropriate to the focal jurisdiction.

CF7.3 Driving fundraising innovation

Requirement

Fundraising leaders and managers should be able to identify and exploit appropriate opportunities for innovation, either focused within their organisation or within the sector as a whole. This requires an understanding of the process of innovation, the sources of

new ideas, and how alternatives might be evaluated. This is a desirable competency for the best fundraising managers. Fundraising leaders and managers should also be able to support their teams in taking necessary and appropriate risks.

Underpinning Knowledge

Innovation theory: Definition of innovation, categories of innovation, theories of innovation, and the innovation process. Barriers to innovation. When to innovate, and when (and why) not to innovate (i.e. continue doing the same). Differences between creativity and innovation.

Innovation in fundraising: How definitions, categories, theories and processes of innovation are, and have been, developed and applied in fundraising; successful and unsuccessful examples/experiences of innovation in fundraising; when to innovate in fundraising; the value of innovation in staying competitive by developing new products and building stronger relationships with existing audiences or developing new ones. Innovation in fundraising leadership (as a opposed to management or practice). Barriers to innovation in fundraising. Fundraising innovation at the sectoral/professional level (e.g. ethics, regulation, professionalism etc). Ethical issues related to innovation in fundraising.

Learning culture: Definition, antecedents and consequences of. Sources of potential learning in the profession of fundraising, national and international. Rewards for learning, leading by example. The role and nature of failure.

Creativity: Definitions. Knowledge, skills and behaviours of creativity. Creativity at work/creativity in personal life. Creativity's role in driving innovation and idea generation. Critical thinking and problem solving (see CF7.1) within the creative process. Design thinking/systems thinking. Incorporating failure into the creative process. Collaboration as part of the creative process.

Idea generation: Sources of new fundraising ideas. Role of secondary research, competitor benchmarking and formal/informal internal sources. Methods for new idea generation (e.g. brainstorming, quality circles, mind mapping, customer feedback, customer and market research, cocreation, sharing prototypes, data interrogation and analysis, emulation of competitors, supplier/partner involvement, formal suggestion or incentive schemes). Apply critical thinking to idea generation.

Evaluation process: Process may include but is not limited to research, design, development of business case (including objectives, success criteria and key performance indicators, cost benefit, analysis/investment appraisal, timescales), approvals, developing, pilot/testing, feedback and monitoring.

Securing investment: Identification of decision makers and influencers. How to develop, document and present proposals.

Managing innovators: How to show that ideas contributed by others are valued and appropriately recognised. Systems for recognition, remuneration and reward.

NB Fundraising leaders should be cognisant of DEI issues and view matters of innovation (and barriers) through a DEI lens (see CF6.2).

CF7.4 Leading integrated communications

Requirement

Fundraising leaders and managers should be able to develop effective and collaborative working relationships with the leaders and managers of other marketing-related functions. They should have an understanding of the cultures and professional perspectives of the different functions, and be able to lead the development of an integrated communications plan. They should also understand the relationship between brand and fundraising, and how to leverage the brand to boost fundraising success.

Underpinning Knowledge

Communications theory: Definition(s) of communications. Models of communication theory (e.g. linear, interactional, transactional; Craig's seven traditions of communication theory). Elements of communication theory: sender & receiver, message, channel, feedback, context, noise, etc. Barriers/interruptions to communication.

Marketing: Definition, models, categories. Marketing orientations. Social marketing. Relationship of marketing to fundraising.

Public relations: Definition, models, Excellence Theory of Public Relations. Relationship of public relations to fundraising and marketing.

Integrated marketing communications (IMC): Communications strategies, objectives, communications mix (including digital communications mix), communications media and best practice in relation to each, communications planning, media neutral planning, and benefits of appropriate campaign integration. IMC metrics and control.

Communications functions: Fundraising, campaigning, marketing of services, social marketing, and advocacy. Aims, objectives and considerations in the marketing communications mix for each. Media strategy, media budgeting.

Creativity in marketing communications: Recap definitions of creativity (see CF7.3), approaches to creativity, and management of creativity. Creativity in marketing communications. Creativity processes.

Consumer behaviour: Elements of consumer psychology, perception, motivation, learning, attitudes and behaviour change (with emphasis on campaigning and advocacy behaviour). Consumer behaviour analyses. NB: fundraising leaders and managers are referred to CF5.1 in the Standard Framework on understanding donor behaviour.

Branding: Definitions, role and nature of a brand. Benefits and drawbacks of branding. Models of brand, approaches to branding, evaluating and enhancing brand value. Brand development and testing, including the importance of stakeholder consultation and buy-

in. Brand personality and values. External and internal branding. Stakeholder identification with the stakeholder map. Strategic brand management. The brand's role in driving income generation. Rebranding: when to rebrand; when to stay the same (see CF7.3 - Innovation).

Working with external agencies: Structure of the communications industry, categories of agency, agency selection and evaluation, agency briefing, structure, review, role of key agency personnel, relationship management. How agencies are remunerated. (See also working with suppliers in CF7.1.)

Public perception of fundraising: Regulatory/legislative/media/public scrutiny of fundraising; understanding reasons for criticism of/hostility toward fundraising by some stakeholders; approaches and initiatives to tackle criticism in public forums. Role of fundraising leaders in advocating for/defending fundraising to stakeholders (see CF 8.1). NB: see also CF7.5 for fundraising leaders' roles in advocating for fundraising within an organisational culture of philanthropy.

Crisis management: Recognising a crisis, what constitutes a 'crisis', what is a crisis in respect of fundraising? Who are stakeholders to the crisis; balancing and resolving duties, harms and goods to each stakeholder. Knowledge of theories of crisis management - including Situational Crisis Communications Theory, Image Restoration Theory, Crisis Management Models (e.g. Mintoff's five strategies of crisis management, Contingency Theory, and others) - and apply as appropriate to crisis situations. See also CF7.2 on ethics and CF8.1 and 8.3 on stakeholder engagement.

Ethical issues: Fundraising leaders should be cognisant of any ethical issues related to leading integrated communications, for which they are referred to CF7.2. Ethical issues may be particularly related to - but are by no means limited to - how beneficiaries and other stakeholders are framed in communications, the appropriateness of messages sent to stakeholders, the appropriateness of various channels, and involving stakeholders (including beneficiaries) in the co-creation of communications. Further, all underpinning knowledge set out in CF7.4 should be viewed through a DEI lens (see CF6.2).

CF7.5 Developing an organisational culture of philanthropy

Requirement

Fundraising leaders should understand the nature and role of organisational culture and its impact on fundraising performance. Fundraising leaders should also be able to appraise the suitability of a given culture and promote and lead on ideas for appropriate change. They should be cognisant of the role of a philanthropic culture in creating an environment conducive to giving and the effective stewardship of fundraising relationships. They should pay particular attention to how culture can deliver sustainable value for fundraising that formal structures and teams cannot.

Underpinning Knowledge

Orientation: Definition and theory of organisational 'orientation'. Types of orientation for for-profit and nonprofit organisations – product, sales, market, customer, philanthropic and fundraising orientations – and their similarities and differences.

Organisational culture: Definition, frameworks for understanding culture, typologies of organisational culture, relationship between culture and strategy, impact of culture on performance at individual, departmental and organisational levels. Role/impact of DEI within an organisational culture (see CF6.2).

Philanthropic culture: Types of philanthropic cultures (e.g. donorcentred, community-centric, and any new/emerging approaches to philanthropy – see CF8.1 and CF8.2). Organisational orientation and philanthropic culture. Stakeholders to/in a philanthropic culture (who are fundraising's stakeholders? – see CF8.1 and CF8.3). Components of a philanthropic culture. Barriers to establishing a philanthropic culture. DEI issues within the philanthropic culture, including whether certain stakeholders are excluded from it (see CF6.2). Decolonisation and power/privilege issues in relation to the philanthropic culture (see CF8.1).

Working with other stakeholder groups: (who are fundraising's stakeholders? – see CF8.1). Understanding of the link between organisational structure and organisational orientation, and fundraising performance. Relevant types and sources of conflict, conflict awareness and management. Negotiation, influence and power.

Perception of fundraising within the organisation/culture: How is fundraising traditionally perceived (e.g. 'necessary evil')?; reasons for this perception. Changing the narrative about fundraising, advocating for fundraising within the organisational culture. Supporting and protecting fundraisers within the organisational culture (see CF7.1 on staff wellbeing).

Organisational values: Definition – what are 'values'? Values as a key component of culture. The role of values in underpinning individual and organisational performance. Role of values in ethics and ethical decision-making (see CF7.2). Influences on culture: internal and external factors that influence organisational culture, including national cultures.

Managing change: The principles and methods of managing culture change within organisations.

Ethical issues: Developing a philanthropic culture is an ethical issue because it impacts multiple stakeholders. Fundraising leaders should therefore carefully consider the effect on stakeholders, particularly from a DEI perspective (see CF6.2), and balance the competing interests of various stakeholders. For this, fundraising leaders are referred to CF7.2.

CF8 Fundraising and philanthropy in context, trends, and stakeholder engagement

CF8's cluster of competencies signpost fundraising leaders to the knowledge, skills and behaviours that could allow them to enhance their organisations' fundraising capabilities through changes at a structural and systems level. Units encourage both fundraising leaders and managers to consider what it means to be a fundraiser, the relationship between fundraising and philanthropy, who fundraising's stakeholders are, and the most appropriate ways to engage with those stakeholders. Fundraising leaders also need to be able to constructively contribute to discussions about the further development of the fundraising profession, including how to attract and train new entrants, and debates about the pros and cons of further professionalisation. Units also examine the potential to develop new audiences, channels and modes of giving, and the latest trends.

CF8.1 Context for fundraising and the fundraising profession

Requirement

An understanding of the context, environment or ecosystem in which fundraising operates will provide fundraising leaders with the skills and knowledge to better deliver the competencies described in CF6 and CF7, as well as take fundraising both at their organisations and with the fundraising profession to the next level.

Underpinning Knowledge

What is fundraising? How is fundraising defined or conceptualised? What is (are) the overarching objective(s) of the practice of fundraising? Are there different definitions or conceptualisations of fundraising and, if so, are these complementary or do they conflict? Does 'fundraising' mean different things to different stakeholders (see below)? If so, how does this impact practice and ethics? Differences (if any) and similarities to 'advancement' and 'development'. Is fundraising a form of marketing, sales and/or PR?

Stakeholders to/of fundraising and fundraisers: Stakeholder Theory: who/what is a stakeholder (definition of 'stakeholder' as someone who can be affected by or affect an organisation's actions)? Who are fundraising's stakeholders – donors, beneficiaries, non-donating public, media, regulators/legislators, senior management and board members, other fundraisers and charities, suppliers, others; Charitable Triad Theory. What duties do fundraisers owe their stakeholders/what rights do those stakeholders have? What duties, if any, do stakeholders owe to fundraisers? How can those rights/duties be balanced? To whom are fundraisers accountable? How are they accountable – i.e. what mechanisms and processes hold them to account? Fundraisers as stakeholders/in their own profession. NB: – Fundraising leaders should note the relevance to fundraising ethics (CF7.2) of identifying and recognising stakeholders to fundraising.

The fundraising profession: Is fundraising a profession? Criteria for demarcating professions from non-professions (trades and crafts). How does fundraising score against these criteria? Advantages and disadvantages of being a profession for all fundraising's stakeholders. Does fundraising need to be professionalised further? What does 'professionalising' mean in this context? Benefits and harms (perhaps unintended) of professionalising, to all stakeholders. Entry routes into the fundraising profession. How to encourage new talent into the fundraising profession. How best to equip new entrants with the skills, competencies and behaviours they need to be successful fundraisers. Barriers to entry to the fundraising profession and how to overcome them. How to ensure equality of access and opportunity to entry to the profession. It is relevant that a DEI lens (see CF6.2) be considered.

Fundraising history: What is the history of fundraising in your country? What have been its significant developments? How do these lead to a better understanding of current practices and ethics? What insight do they shed on emerging ideas about fundraising and philanthropy (see CF8.2)? What can be learned from the history of fundraising in other countries? The difference between the history of fundraising and the history of philanthropy (most published matter focuses on the history of how people have given to charity rather than how they have been asked to give).

Different approaches to/lenses of philanthropy: Fundraising practice and theory traditionally takes a donor-focused (or centred) approach. What other approaches to fundraising and philanthropy might fundraising leaders need to consider? Community-centric Fundraising (CCF) and other community-focused or beneficiary-focused approaches (see CF8.3 for further detail). Decolonisation issues. Donor power dynamics and donor dominance (see also the section on inappropriate donor behaviour in the section on DEI and fundraiser wellbeing in CF7.1). Involving service users/beneficiaries in decision-making. Defences of philanthropy and fundraising. 'Democratisation of philanthropy' and disintermediated giving (e.g. through crowdfunding sites); associated ethical issues (see also section on disintermediation in CF8.3).

Government policy and influence: Responsibilities of relevant government departments, their policies, and the application thereof. Role of taxation. Regulation of fundraising practice, regulation of professional fundraisers; is regulation of fundraising changing, and what impacts does this bring to fundraising and philanthropy (see CF7.2)?

Relationship with the state: What is the nonprofit sector's traditional relationship with the state? How does this promote or inhibit fundraising and philanthropy? How is this changing - is this a threat or an opportunity?

Models of social change: Theories of social change - Evolutionary, Cyclical, Economic, Conflict and Technological. How to create change for organisations and society. How to create transformative change for the profession of fundraising.

CF8.2 Developments in fundraising and philanthropy

Requirement

Fundraising leaders should be able to contribute to national and European debates on how to stimulate fundraising, philanthropy and grow giving, and apply this to their own organisations. They should be able to apply a detailed understanding of donor behaviour (see also CF8.3) to offer suggestions for growth in each fundraising market. They should also be able to reflect on both supply and demand side factors, with the capacity to grow philanthropy and evaluate their relevance for (and application to) a focal fundraising market.

Underpinning Knowledge

Trends and issues in giving: Current trends and issues in relation to each major form of giving (individual, corporate and foundation) and segment of supporters. Participation in giving and national and European trends. Profile of different categories of supporters and potential audiences underrepresented in giving.

New and emerging forms of giving: New forms of giving. New fundraising markets/audiences. How do different generations differ in their approach to the charitable sector? The social role of the sector in developing a societal culture of philanthropy. Role of government and other agencies in developing giving. Current and emerging initiatives to foster giving.

New and emerging forms of fundraising: New forms of fundraising. Adaptations or incremental innovations to existing types of fundraising. Innovations from outside of fundraising are adapted or applied for use in fundraising. Technological advances and innovations, and how these can be used in fundraising. How do new forms of fundraising compare against existing tried and trusted methods? What ethical and regulatory issues do new and emerging forms of fundraising throw up? Can existing systems of ethics and regulation encompass new forms, or will they need to be adapted (see CF7.2)? This subsection aligns closely with CF7.3 – Driving fundraising innovation.

Lessons from other countries: Fundraising and philanthropy in different traditions and cultures, giving patterns, forms of giving, and ways of asking.

CF8.3 Stakeholder engagement

Requirement

So much of fundraising is about creating and maintaining relationships with stakeholders. Donors are incredibly important stakeholders to fundraising. Without donors to fund the work that nonprofits do, that work would not get done. It is therefore essential that fundraisers understand donor behaviour and motivations, and know how to communicate with donors in ways that will enable nonprofits to fulfil their missions. It is essential that fundraising managers know how to implement donor-centred ideas and practices in their

planning and strategies. That is why both the EFA Standard and Advanced Frameworks focus so much on donors. But donors are not fundraising's only stakeholders, and a donor-centred lens is not the only way the only lens through which to focus on fundraising. Fundraising leaders need to be aware of the needs of all stakeholders to fundraising, how best to frame the needs of one group of stakeholders to other stakeholders, and how to engage all stakeholders, not just donors.

Underpinning Knowledge

Stakeholder engagement: What is stakeholder engagement? Stakeholder mapping. Stakeholder engagement strategies and tactics. Public understanding and public engagement; the difference between the two; advantages and disadvantages of both. Strategies and tactics for public engagement (e.g. citizen juries, roadshows). This section should be considered in conjunction with the section 'stakeholders to/of fundraising' in CF8.1.

Donor-centred approaches to fundraising: Explanatory note – As explained in the 'requirement' introduction to CF8.3, donor-centred ideas and approaches are predominant in fundraising. However, it is also important that fundraising leaders understand that being donor-centred has limits, has the potential to result in harms to some stakeholders, and is not the only lens through which to focus fundraising. This subsection, therefore focuses on knowledge that relates to the 'philosophy' rather than practice or donor-centred fundraising. This knowledge comprises:

Origins of donor-centred ideas and practices: Key texts and thought leaders; rationales behind/antecedents of the development of donor-centred practices. Evidence supporting donor-centred practices. Ethics of donor-centred fundraising (see CF7.2): potentially harmful outcomes – what are the harms, to which stakeholders?; critiques of donorcentricity from the perspective of alternative approaches to fundraising. The future of donor-centred fundraising: new and alternative ways to meet donors' needs through their philanthropy.

Donor identity: Concepts of donor identity, degrees and types of identities, the value of identity to a nonprofit, the meaning of identity to an individual, and how a donor's identity might lead to more behaviours beneficial to the organisation. How beneficial behaviour to the organisation reinforces the donor's identity. Key determinants of strong donor identification with an organisation.

Identity fundraising/marketing: Principles of identity-based marketing/fundraising, plan donor's identity development, establish donor empowerment programme (as a way of strengthening donor identification with an organisation) and create behavioural transitions of committed involvement within the organisation (during life and after death). Monitoring and evaluation: calculation and interpretation of key identity metrics.

Philanthropic psychology: What is philanthropic psychology? Role of identity within philanthropic psychology. What is meant by 'love' in the context of philanthropic psychology, different types of love as expressed by donors and how this motivates and

reinforces their giving behaviour. Donor wellbeing in the context of philanthropic psychology: Components, antecedents and consequences of wellbeing, how to design communications and interactions that stimulate feelings of wellbeing.

Transformational philanthropy: Definitions. Applications in the context of mass and major donor philanthropy. The ability of gifts to be transformational for donors and a focal organisation. Nature of transformations and the factors that drive them.

Community-oriented approaches to fundraising: What are/types of community-oriented/focused/centric approaches to fundraising; understanding that this is not simply community fundraising by another name. Stakeholders to community-oriented approaches; relationships between stakeholders. If and how fundraisers' duties to stakeholders differ under community-oriented fundraising approaches from those under other approaches. Identify and describe community-oriented fundraising practices; evidence for their efficacy in fundraising; differences and commonalities between community-oriented fundraising practices and other types of donor engagement (particularly donor-centred fundraising). Content/subjects/topics of engagement with stakeholders, particularly donors. The role of community-oriented approaches in challenging donor power and privilege, and appropriateness thereof. Engaging beneficiaries/service users in community-oriented fundraising (see also CF7.4). Ethical critique of donor-centred approaches to fundraising from a community-oriented perspective. Ethical critique of community-oriented approaches to fundraising.

Critiques and defences of philanthropy: What are the critiques and criticisms of philanthropy? Where do such critiques come from/why are they made? Critically evaluate such critiques and criticisms and offer defences of philanthropy against such critiques and criticisms.

Disintermediation: What is disintermediation ('cutting out the middleman')?; origin of the term in the commercial sector. What is disintermediation in the nonprofit context? What is disintermediated (i.e. cut out)? Typologies of disintermediation in fundraising and philanthropy. Types of disintermediation of giving: crowdfunding, microdonations, microlending, and direct giving. Difference between disintermediated giving and decentralised giving. Types of disintermediation of asking (disintermediation of a nonprofit's fundraising function): microdonation/round up online/digital apps; tribute funds as a form of disintermediation. Disintermediation of the donor experience: How can charities reintermediate themselves into the donor experience to add value? What extra value can they add? Giving patterns and behaviour of donors who give via crowdfunding and other types of disintermediation. Typologies of crowdfunding donors. Motivations of people who donate via disintermediated channels (why do some people prefer to give outside of an established nonprofit channel?). Motivations, behaviours and typologies of people who run disintermediation fundraising appeals (citizen fundraisers). Ethical issues and challenges associated with disintermediation in/of charitable giving. Regulation of various forms of disintermediation, including the regulation of citizen fundraisers.

Artificial intelligence: How can AI be used to engage with all stakeholders? What are the ethical implications for all stakeholders (see CF7.2)? How much human oversight is

required in using AI to engage with stakeholders? NB: This section should be considered in conjunction with the competencies on the ethical implications of using AI in CF7.2.

New and emerging forms of stakeholder engagement: Emerging digital technologies. Patterns of social media and app use. New generations of AI. Public relations theory and its applicability to fundraising. Co-creation of fundraising with stakeholders (also covered in CF7.2 and CF 8.1). See also CF7.4 on leading integrated communications.

About the European Fundraising Association (EFA)

The European Fundraising Association is a network of national fundraising organisations working together to advance and strengthen fundraising across Europe.

We speak with one voice to promote best practice, support professional certification, shape EU policy, and connect fundraisers.

We welcome applications from national fundraising associations and organisations to join our member base.

Contact us

Eduard Marček, Executive Director
European Fundraising Association
James Wattstraat 100
NL-1097 DM Amsterdam
Netherlands
www.efa-net.eu
eduard.marcek@efa-net.eu | info@efa-net.eu
@EFAFundAssn

EFA is registered at the Netherlands Chamber of Commerce, reg. no. 34212817.